

## **Session 1: Introduction**

### **What's the same:**

1. Goals of session (most)
2. Discussion of serials and “seriality”

### **What's different:**

1. Elimination of e-serials cataloging as part of Basic workshop
2. Introduction of the CONSER Standard Record (CSR)
3. Throughout: Redesign of slide layout and fonts for a “cleaner” look

### **Things to emphasize in session:**

1. Serials are one type of continuing resource
2. Serials are dynamic publications
3. Current CONSER standards/practice and tools and where to find them  
(These three points are generally the same as in this session's Summary slide)

### **Slides to model:**

[None]

### **Sample questions from participants:**

[None]

## **Session 2: What is a Serial?**

### **What's the same:**

1. Three segments: definition; identifying characteristics; MARC tagging
2. Presents a few borderline cases: conference publications, loose-leafs, supplements, reprints
3. Exercises the same

### **What's different:**

1. Goals: Removed assumption that catalogers were familiar with monographic MARC records (and just needed to learn what was different about serials)
2. Definition: Jump-off point is common language definition of serial (slide 2)
3. Change over time: Introduction of concept that serials may change type of issuance in addition to other changes (slide 18)
4. MARC tagging segment emphasizes CSR coding (slides 19-24)
5. "\$5 NUC symbol" now called "MARC21 institution code" (slide 13)

### **Things to emphasize in session:**

1. The three defining characteristics of a serial (essential)
2. Clues to use when considering if a publication is a serial
3. Trainers should be prepared to defer in-depth questions related to CSR guidelines and MARC21 tagging (these may be answered during Sessions 3-4)

### **Slides to model:**

Exercise 2 (slide 28)

### **Sample questions from participants:**

1. Our library only keeps the latest volume of tourist guides. Can I treat them as monographs? [OR: If we receive a single volume of a directory, should we consider it to be a monograph when we catalog it?]
2. Why can't we record ISBNs on records for serials?

### **Discussion for future enhancement:**

What kinds of questions are you getting from acquisitions staff, public services staff, or others that we could use to enhance this session?

### Session 3: Original Cataloging

#### What's the same:

1. Goals of session
2. Sample serial (with animated slides): Tennessee Ancestors
3. Sources of information
4. Choice of main entry
5. Title proper and transcription challenges

#### What's different:

1. Introduction/background for the CONSER Standard Record (CSR)
2. Incorporation of the CSR as an "option" for uniform title, other title information, statement of responsibility, and variant titles
3. Changes to OCLC default fixed field (fill characters)

#### Things to emphasize in session:

1. What are we trying to achieve in the catalog record? (It would be nice to have a discussion up front about that with the participants.)
2. There is more than one "right" answer because of AACR2 v. CSR (which is an uncomfortable concept for a lot of people). How do we deal with this concept given our answer to the first question above?
3. Interrelationship of AACR2, CSR, and CONSER practice – the importance of knowing where to go for answers and that it's OK to say "I don't know."
4. There are other SCCTP workshops available for more advanced material (e.g., electronic serials).

#### Slides to model:

1-4; 13-15

#### Sample questions from participants:

1. How do I transcribe the 260 field? What if I want to include the date even though CSR guidelines *tell me not to*? (Wording here is deliberate.)
2. Why are some notes required by the CSR and not by AACR2 (DBO, source of title and LIC)? Which practice should I follow?
3. What if I want to add a uniform title for the online version of a print serial (another common CSR question)?
4. What if I'm working with copy that contains fields that I wouldn't use for CSR? (Feel free to defer these types of questions until Session 6.)

#### Discussion for future enhancement:

1. How much can we expect to teach beginners about the two different approaches to cataloging: 1) what we are calling "AACR2" and 2) CSR?
2. Draft comparison table of AACR2 and CSR: Does this help or confuse? Other ideas for integrating both of these cataloging approaches into a beginning course?

## Session 4: Original Cataloging: What Next?

### What's the same:

1. Goals of session
2. Editions
3. Series
4. Notes (most of them)

### What's different:

1. Continuation of the incorporation of the CSR as an "option" for publication information, physical description, frequency, issuing body note
2. Using the 362 unformatted note vs. 362 formatted designation statement

### Things to emphasize in session:

1. Reiterate: What are we trying to achieve in the catalog record? How does this apply to looking at the 362 unformatted note? How does this apply to looking at the "catalogers' notes" we must include?
2. Guidelines for the CSR state that some data elements are optional. If you decide to add one or more of these elements (uniform title, date of publication, etc.), current CONSER policy says this is fine. (Need to emphasize that CSR guidelines *do not forbid* us to go beyond the required elements.)

### Slides to model:

3-9, 12-13

### Sample questions from participants:

1. What if I want to add ... (fill in the blank!)
2. Can I create a formatted 362 if I want to? If I do, do I still need the DBO note?
3. Can I make my own abbreviations when transcribing the numbering information? (What exactly are my choices if I'm using CSR?)

### Discussion for future enhancement:

1. How much should we incorporate potential answers to anticipated questions in the trainer notes (or should we at all)?
2. How can we be sure that when trainers reach this session they feel prepared and comfortable dealing with "AACR2 v. CSR questions"?
3. What have you found to be the best sources for your own information about the CSR?

## **Session 5: Working with Copy: Finding Appropriate Records**

### **What's the same:**

1. Goals of the session
2. Many examples are AACR2 (since that is what catalogers will find)
3. The exercises

### **What's different:**

1. General: removed from trainer's notes the information that duplicated slide outline
2. Modified: Two exercises show CSR coding
3. Added:
  - a. CSR-related notes for trainer's benefit
  - b. Two optional slides: OCLC parallel language record; OCLC institutional record

### **Things to emphasize in session:**

1. Three step process:
  - a. Searching phase (to identify copy);
  - b. Matching phase (to compare records);
  - c. Evaluative phase (to determine amount of modification needed)
2. Basic clues and where to look in the record:
  - a. Choosing serial segment (ISSN, numbering/dates, publisher info in 260 AND notes, 6XX, 7XX linking fields for OCLC, watch for 040 \$b)
  - b. Identification of matching format (FF, 006/007, 245 \$h, 533)
  - c. Selection among matching records (latest entry/successive entry)
3. Local policies affect some of the decisions made in choosing copy. This is fine. For those developing or reviewing policies, keep in mind possible uses down the line (esp., consortial uses of OCLC)

### **Slides to model:**

Is the record for the same physical format?: slides 11-17

Follow-up: How have you presented this series of slides?

### **Sample questions from participants:**

1. If I have a microform serial, can I use the record for the print version?
2. We use the print record when we have access online. Is this ok, or should we stop?
3. If we have one volume of a directory, and there's copy as a serial and as a monograph, which should I use? Can I catalog this as a monograph?
4. If I find duplicate records in OCLC, should I report them? How?

### **Questions for future enhancement:**

1. What kinds of questions are you encountering re: how to select copy? (i.e., What additional aspects would you like to see addressed in a revised version of the Basic Cat Workshop?)
2. What ideas do you have for increasing interaction with participants?

## **Session 6: Working with Copy: What to Edit?**

### **What's the same:**

1. Goals of the session
2. Basic philosophy: modify to correct errors, to reflect changes in the publication, to enhance access
3. Recognition of local system needs & policies (slides 11-12)

### **What's different:**

1. A *lot* longer
  - a. CONSER Standard Record-based examples; emphasis on MAP and Appendix A
  - b. Examples changed to before/after to allow participants to work through problems
  - c. Order of slides changed
  - d. Emphasizes certain basic types of modification
2. Recognition of increased importance of ISSN in records (for check-in, OpenURL resolution, etc.)
3. Numbering modification chart (slide 21)
4. Frequency modification (slides 24-27)
5. Other versions (slide 28)
6. Four additional exercises (Set A) to practice CSR modification

### **Things to emphasize in session:**

1. Catalogers will see more variation in records, due in part to increased options. Think about which modifications will enhance identification/access or are required by local policies.
2. Catalogers can keep up with changes to CSR affecting record maintenance through the CONSER Web site, as well as through listserv announcements. Watch for announcements re: coding of imprint changes (multiple 260), issuing bodies changes (710), series access changes (830), and linking field changes (780/785).
3. Trainers should feel welcome to use the SCCTP trainer's list whenever unclear about how to respond to a question. In many cases, several options may be available to the cataloger.
4. Because this session is long, trainers should be prepared to defer questions about when to create a new record (these may better be answered during presentation of Session 7).

**Slides to model:** Slides 4, 6-12

### **Sample questions from participants:**

1. When do I need to edit a record in our local system (v. in OCLC)?
2. What do I need in order to prove that a serial has ceased? Can I use this little piece of paper that Acquisitions sent?
3. Why do we need the latest issue consulted note? Why is this being added to the record now?
4. You talked about changes to the title, but when does the record need to be edited for a change to the subtitle?

## **Session 6: Working with Copy: What to Edit? (continued)**

5. How should I edit a record if the numbering is very complicated, e.g., non-commercial serial with repeated volume numbering, some issues without volume numbering, combined issues, etc.?
6. When should I use the 515 note (as opposed to the 362)?
7. What should I do if we got some issues of one edition (international ed.) and some issues of another edition for a periodical? Can I make a note or do I need a separate record?
8. How can I get rid of X from our OCLC records (X=fields not used locally, such as 050 for a Dewey library, or MeSH headings for a library that uses LCSH)?

### **Discussion for future enhancement:**

1. Should editing of pre-AACR2 records be removed from Basic Cataloging Workshop?
2. What kinds of questions are you encountering either from Acquisitions staff, Reference staff or new catalogers, that affect how you edit records?
3. Should this module be split into two parts, one for modifying CSR records and one for modifying AACR2 records?

## **Session 7: When Do I Need a New Record?**

### **What's the same?**

1. Goals of the session
2. Most examples
3. Most decision processes regarding major or minor changes

### **What's different?**

1. Discussion and instruction of CSR vs. AACR2
2. Some examples reflecting CSR, both actual or made up serials
3. Some new slides (39-40) emphasize more complex types of changes (mergers, splits) and specifically indicate the components of linking entry (\$x, \$w, etc.)

### **Things to emphasize in session:**

Decision process when judging whether a change is major or minor

### **Slides to model:**

10-20, 39-40

### **Sample questions from participants:**

1. Are the examples on the slides all of minor changes? [New catalogers are sometimes confused by major/minor distinctions.]
2. When does a corporate body recorded as part of a title change enough to cause a major change?
3. What is a "type of resource" word?

### **Discussion for future enhancement:**

What kinds of questions are you getting from workshop participants that we could use to enhance this session?